



New Account Summary Sheet

Account Information				
Name of Introducing Broker: _____	Sales Series: _____	Office Code: _____	Account: _____	Account Type: <input type="checkbox"/> Individual/Sole Proprietorship
Customer Name: _____				<input type="checkbox"/> Joint
Email Address: _____		If Discretionary, Name of POA: _____		<input type="checkbox"/> Corporate
List Hedge Products: _____				<input type="checkbox"/> Partnership
				<input type="checkbox"/> LLC
				<input type="checkbox"/> Trust
				<input type="checkbox"/> IRA
Commission Rates Per Side <i>Default currency is USD. If there are multiple rates please attach rate sheet.</i>				
Futures: _____		Options: _____		
<i>(Per Side)</i>		<i>(Per Side)</i>		
Commission Rates Per Side <i>Default is Half In/Half Out.</i>				
<input type="checkbox"/> Half In/Half Out		<input type="checkbox"/> Up Front		
Fee Processing <i>Default is Plus Fees.</i>				
<input type="checkbox"/> Plus Fees		<input type="checkbox"/> All Inclusive		
Trading Software <i>If none, please indicate none</i> <i>Eligible for Market Data Fee Waiver</i>				
Platform Name: _____		Yes _____ No _____		Miscellaneous Fee
		Fee Name: _____		Rate: _____ <i>(Per Side)</i>
AP Approval				
Signature: _____		Date: _____		
INTERNAL OFFICE USE ONLY				
Group Office/ Group Account Number _____		iDash: <input type="checkbox"/> Setup		Rates: <input type="checkbox"/> Setup
CTA Manager Number: _____		CTA Exempt: <input type="checkbox"/> Yes <input type="checkbox"/> No		